



SETTING UP A PERFORMANCE AGREEMENT - CHECKLIST

Step One : Plan

- Review your office's goals for the year ahead. Think about performance goals and behaviour expectations for each employee that will assist your office reach its goals.
- Prepare dot points to assist in what you need to cover meeting with each employee.

Step Two : Discuss

- Arrange to meet with the employee at a time and in a place where you won't be interrupted, distracted, overheard or rushed.
- Meet with each employee to discuss their individual goals and behaviour expectations – these should be specific, measurable, realistic and relevant to the employee's duties.
- Set a realistic timeframe for the employee to work towards their goals, and a time for you and the employee to meet to review their performance.
- Agree and record these goals in a performance agreement, along with the development plan that will support the employee reach their goals (eg. training). You can use the performance agreement template available.
- Both you and the employee are to keep a copy of the employee's performance agreement.

Step Three : Monitor

- Monitor your employee's performance and support them while they work towards their goals.
- Give regular feedback (both positive and constructive) to the employee, and deal with any performance issues as soon as they come up.

Follow the 'AID' approach when giving feedback:

1. Action – describe the specific actions you want to give feedback on (ie. the 'what,' 'when' and 'where').
2. Impact – explain the impact of the employee's actions (eg. on their work, co- workers, constituents or the office itself).
3. Desired outcome – explain what you would like to see continuing or changing. Where change is required, explore with the employee how they can make this change and how you can support them.

- Consider the impression that your body language gives – face the employee, adopt an open posture, maintain good eye contact and try to be relaxed.
- Sharing constructive feedback can be difficult. MaPS can provide assistance and support to managers having performance discussions. Support is also available from PWSS and EAP if an employee becomes distressed.

Step Four : Review (Interim & final discussions)

- Conduct a review with each employee every 3-6 months to assess their performance against their goals and revise goals as part of the current or new agreement.
- Make sure both you and the employee have time to prepare for the review. You should both read through the employee's performance agreement and think about how they've performed against their goals.
- Prepare dot points to aid with what you want to cover in the review.
- Ask the employee how they think they've performed against each of their goals.
- Give the employee feedback about how you think they've performed – both what they've done well and what they can do to improve. Your feedback shouldn't come as a surprise to the employee.
- Give the employee the chance to share any feedback or concerns they have .
- You may also want to discuss the employee's career goals and their future within your office.
- Finally, agree and record goals (these might be the same goals or new ones) as part of their current or next performance agreement.

